# Elections Management Portal (EMP) for non-QVF users



Michigan Department of State Bureau of Elections

October 2013

### **Elections Management Portal (EMP) - Table of Contents**

This manual is for non-QVF users who are required to use the Elections Management Portal (EMP) to track absentee ballot activity. The Elections Management Portal also allows the look-up of registered voters througout the State, the ability to generate a ballot for military and overseas voters, and provides for the download of the Electronic Pollbook software and upload of the EPB Voter History file. This manual may be found on the Bureau of Elections website at <a href="https://www.michigan.gov/elections">www.michigan.gov/elections</a> - <a href="https://linkowski.gov/elections">Information for Election</a> <a href="https://doi.org/doi.org/elections">Administrators</a>.

Introduction to the Elections Management Portal	
Logging into the System	∠
Searching for Voters	
Editing Information in the EMP	£
Other Options – Signature and Dymo Label	6
Generating a Ballot for a Military or Overseas Voter	
Printing or Faxing the EMP Ballot Request	8
E-mailing an EMP Ballot Request	
AV Information – Ballot Tracker	
Sending Absent Voter Applications	
Receiving an AV Application and Sending an AV Ballot	10
Receiving an Absent Voter Ballot	
Processing Spoiled or Rejected Ballots	
Receiving a Federal Write-In Absentee Ballot (FWAB)	
Marking a Ballot as Undeliverable	
Permanent Absent Voter List	13
Statistics and Reports	
Ballots Sent and Received	15
AV List Report	
Daily AV Report	
E-Pollbook Download	
Importing EPB Voter History File	22
Street Index Search	
Viewing QVF Inbox Transactions	
Changing Password	
Glossary	24

### **Introduction to the Elections Management Portal**

The Elections Management Portal (formerly known as state-wide look-up) was modified in August of 2012 to give jurisdictions unable to access the Qualified Voter File (QVF) or QVF Lite the ability to track absentee ballot activity. This modification was in response to the federal Military and Overseas Voters (MOVE) Act and the requirement that all military and overseas voters be allowed to check their absent voter status through a free access system. Using the Michigan Voter Information Center (MVIC – <a href="https://www.michigan.gov/vote">www.michigan.gov/vote</a>) all voters may track the status of their absent voter ballot as long as local jurisdictions have entered that information into the QVF, QVF Lite, or the Elections Management Portal (EMP). As of August 15, 2012, local jurisdictions are required by PA 270 of 2012 to enter absent voter application and ballot activity for all absent voters into one of these sources.

### **Key Points**

- Ability to Search for Voters Registered within the Jurisdiction as well as State Wide

  The EMP allows for use of the internet to search the QVF database to locate any registered voter within the State.
- Ability to Track Military and Overseas Status

  Military and overseas voters require extra identification. The EMP allows the recording of the data required to be reported for military and overseas voters by the Election Assistance Commission (EAC).
- Ability to Generate a Ballot for a Military or Overseas Voter

  Military and overseas voters must be sent some form of ballot 45 days prior to an election if requested more than 45 days prior to an election. The EMP can be used to generate an emailable ballot to send military and overseas voters who have requested their ballot via email. In addition, the EMP ballot may be printed to fax or postal mail a ballot when precinct ballots are not available in time.
- ☆ Ability to Track All Absent Voter Activity for Each Election

  Jurisdictions without QVF or QVF Lite access are now required by law to enter absent voter activity into the QVF database. The EMP allows jurisdictions without QVF or QVF Lite to use the internet to comply with this requirement.
- Ability to Run Various QVF AV Reports

  As in QVF, the EMP allows a jurisdiction to print absentee ballot reports to show the information entered into the ballot tracking application.
- ☆ Ability to Import and Export the Electronic Pollbook Software \*New\* functionality added in July 2013

  Jurisdictions without QVF or QVF Lite access may use the EMP to download the Electronic Pollbook software for use on Election Day. In addition, those same users may upload the EPB Voter History file directly into the EMP.
- ☆ Ability to View the QVF Street Index

  Jurisdictions may view the QVF street index for the entire state in the EMP.

#### **Important Considerations**

Use of QVF, QVF Lite, or EMP to track all absentee ballot activity is now **required by State law**. The EMP is being provided to jurisdictions without QVF or QVF Lite to enable compliance with this law. In addition, military and overseas voters must be properly tracked by federal law.

The EMP ballot is generated by the QVF E-Wizard. The E-Wizard is where all candidate and proposal information is entered into QVF for the EMP to create a usable ballot in the event ballots are not available by the MOVE Act absentee ballot issuance deadline. If errors are found, contact your County Clerk immediately. And always remember that the **EMP ballot should be used when regular ballots are not available** 45 days prior to the election.

More information on military and overseas voters and the MOVE Act can be found in the <u>Military and Overseas Voters Manual.</u>

### Logging into the System

Using your internet browser go to <a href="https://webapps.sos.state.mi.us/QVF">https://webapps.sos.state.mi.us/QVF</a> and log into the Elections Management Portal (EMP). If you do not have a user name and/or password or your account has become inactive, contact the QVF Help Desk at 1-800-310-5697 for assistance. If you have entered your username and/or password incorrectly five times in succession, the EMP will lock your username's access for thirty minutes.



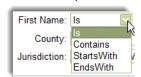
The EMP allows a jurisdiction access to the State of Michigan voter registration database (QVF). Portions of all registered voters records may be viewed. This can be a helpful tool for various voter registration functions as well as assisting voters in finding where they are registered to vote when they are not found in your jurisdiction.

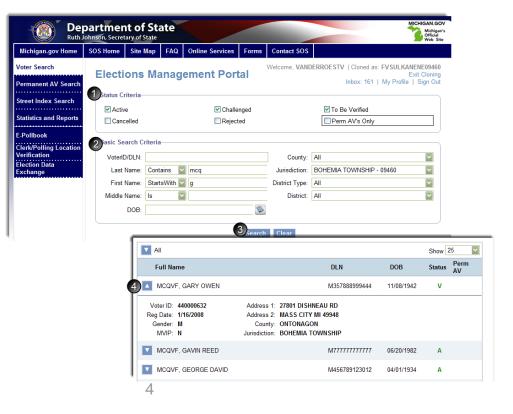
In addition, the EMP gives access to a jurisdiction without QVF or QVF Lite to their voter database.

#### To look up the voter:

- 1. Select Status Criteria
- 2. Enter Search Criteria
- 3. Click Search
- Click the arrow to the left of the voter's name to expand the selection or click the correct voter's name to display all information

**Important Note:** When searching, use the drop down (shown below) to limit or expand search options.



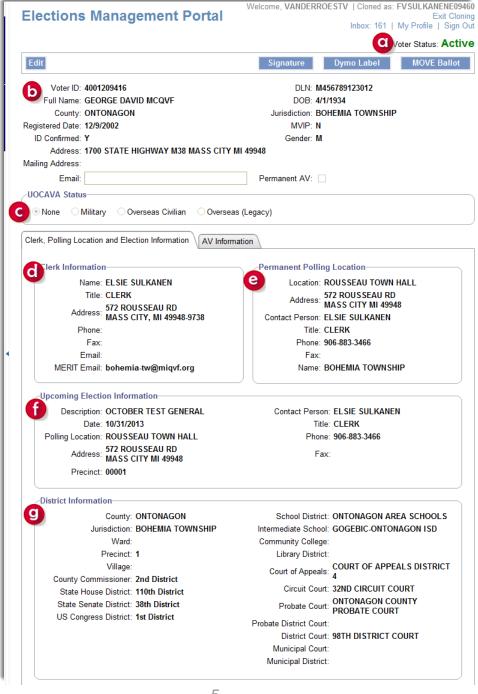


### Voter Information

Selection of the voter brings up a variety of information regarding the voter's registration and status.

#### Review the screen:

- Voter Status a.
- b. Voter information
- c. UOCAVA Status if the voter is a military or overseas voter that status will be listed
- d. Clerk Information
- e. Permanent Polling Location Information
- Upcoming Election the next election the voter is eligible for will be listed including an alternate polling location in the event of consolidations or temporary changes
- District Information



### Editing Information in the EMP

Voter registration information must still be entered into QVF or QVF Lite. A jurisdiction without QVF or QVF Lite will still need to work with the County Clerk to enter and edit voter registration information. However, the EMP does allow a jurisdiction to edit information that pertains to military and overseas voters (UOCAVA) as well as add voters to a permanent absent voter list.



### Other Options - Signature and Dymo Label

The EMP will display the voter's signature for use when comparing absent voter application and ballot signatures, petition signatures or simply for comparison with a new voter registration form.



### Generating a Ballot for a Military or Overseas Voter

For full instructions on Military and Overseas Voter ballot issuance, refer to the <u>Military and Overseas Voters</u> <u>Manual.</u>

#### To create the EMP ballot:

- In the voter's information screen, click MOVE Ballot
- 2. Click Open

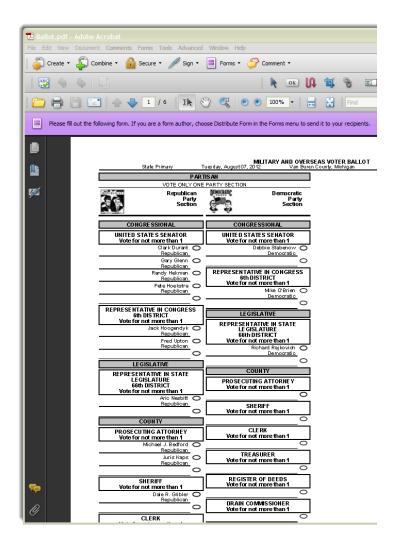


### **Reviewing the EMP ballot**

The ballot, voting instructions, and voter signature certificate will be created into a single .pdf file, like the example to the right.

Review the ballot to ensure it is the correct ballot for the voter and the offices listed are correct. If an error is found, contact your County Clerk as they'll need to make the correction in QVF's E-Wizard.

See the next page for detailed instructions on how to print, fax, or email the .pdf ballot.



### Printing or Faxing the EMP Ballot Request

If a military or overseas voter has requested his or her ballot via <u>postal mail</u> but physical ballots provided by the County Clerk will not be available prior to the 45 day mailing deadline, simply print the ballot.pdf created in the Elections Management Portal. After following the steps provided on page 7, print the ballot by:

- 1. Click the Printer button
- 2. Click OK

After the ballot has printed, place all six pages into a military/overseas absent voter ballot envelope, including the return military/overseas absent voter ballot envelope and mail to the voter.

If physical ballots are available follow regular absentee ballot issuance procedures.

If the military or overseas voter has requested his or her ballot via <u>fax</u>, follow the printing instructions above and fax all six pages to the telephone number provided by the voter. Ensure the ballot was transmitted and retain a copy of the confirmation page.

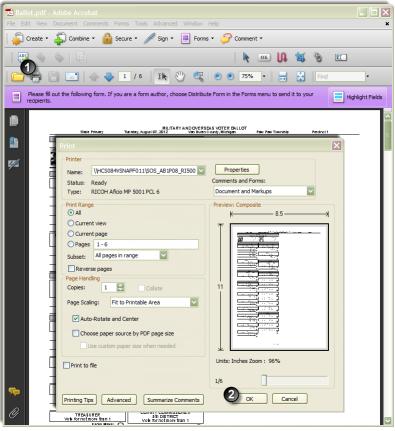
### E-mailing an EMP Ballot Request

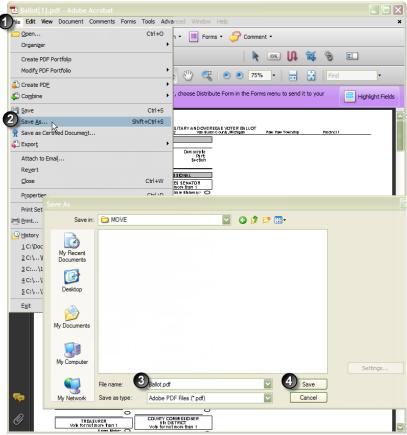
If the military or overseas voter has requested their ballot via email, follow the instructions below to prepare and send an electronic ballot to the voter.

#### To save the EMP ballot:

- 1. Click File
- 2. Click Save As...
- Select a folder to save the ballot in and name the ballot for easy identification.
- 4. Click Save

Use MERIT email to email the ballot. Full instructions can be found in the <u>Military and Overseas Voter Manual for Election</u>
<u>Administrators.</u>





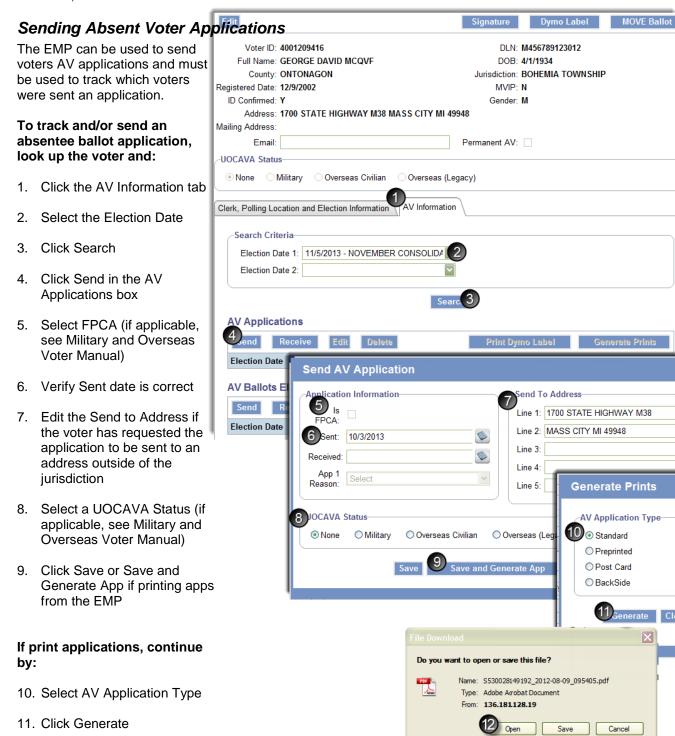
nerate Close

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open o save this file. What's the risk?

### AV Information – Ballot Tracker

12. Click Open

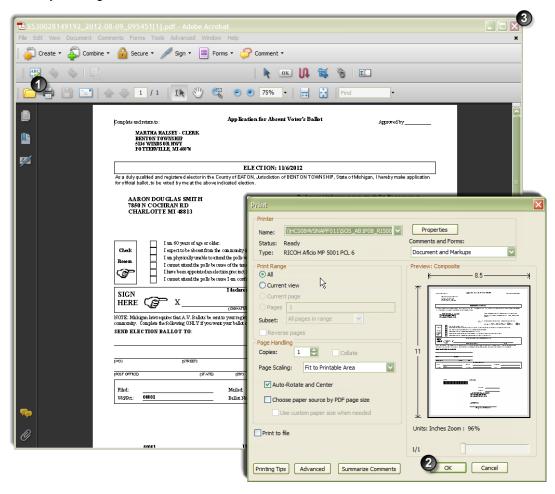
The EMP allows users the functionality of QVF to assist jurisdictions with issuing and receiving both absentee ballot applications and absent voter ballots. At a minimum, jurisdictions must use the AV Information portion of the EMP to enter when absent voters were sent applications, when the Clerk received the application and sent the ballot, and when the Clerk received the absent voter ballot back.



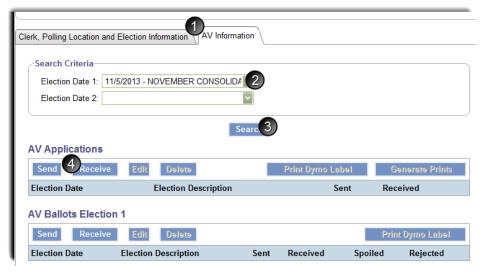
### **Printing the Application**

Once the .pdf is open:

- 1. Click the Printer button
- 2. Ensure the proper printer is selected and click OK
- 3. Close the window by clicking on the red X



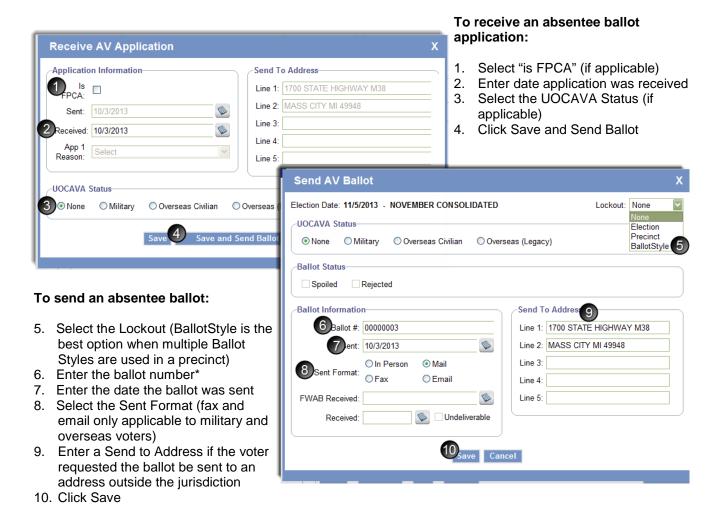
Receiving an AV Application and Sending an AV Ballot



To receive an absentee ballot application and show issuance of a ballot:

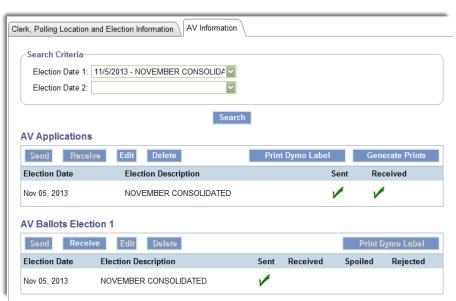
- 1. Click the AV Information tab
- 2. Select the Election Date
- 3. Click Search
- 4. Click Receive in the AV Applications box

Continue to next page.



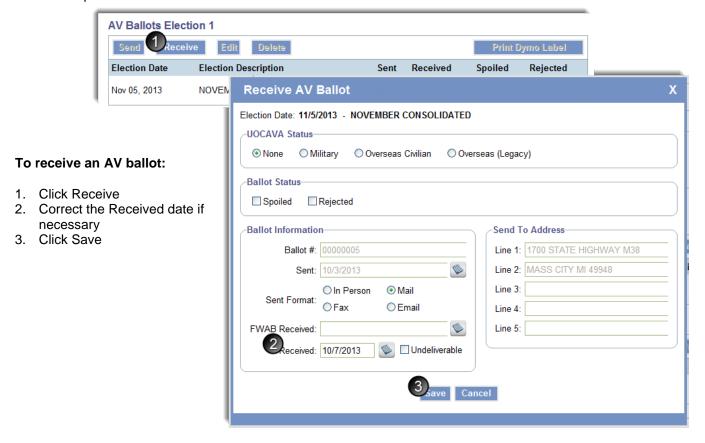
\*Important Note: If the EMP ballot is being sent via email, fax, or postal mail, number the Ballot with ET00001, ET00002, etc.

Ensure the recording of the application and ballot. A completed transaction should look similar to the image on the right.



### Receiving an Absent Voter Ballot

When the voter has mailed back or returned the absent voter ballot, the Ballot Tracker must be updated to reflect receipt of the ballot.

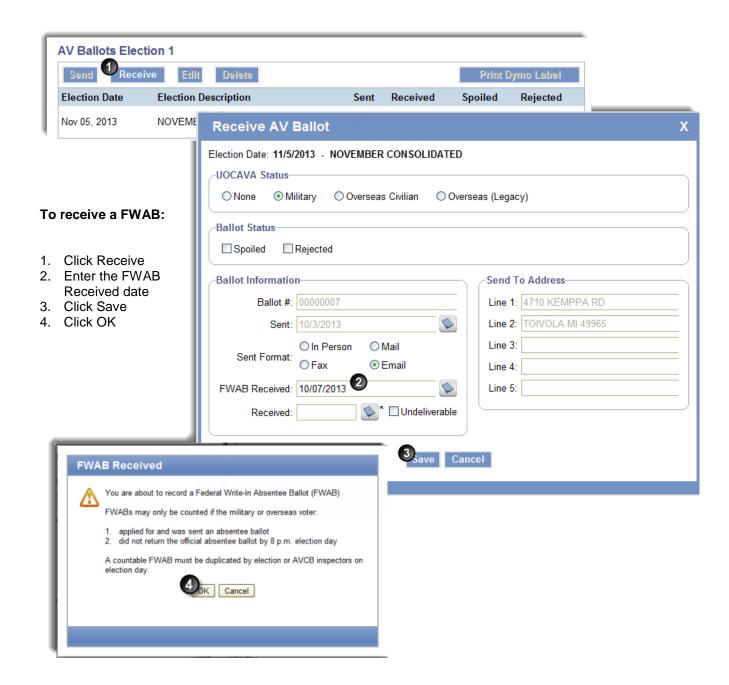


### Processing Spoiled or Rejected Ballots



### Receiving a Federal Write-In Absentee Ballot (FWAB)

If a military or overseas voter submits a Federal Write-In Absentee Ballot (FWAB) the Ballot Tracker must be updated to reflect receipt of the FWAB. For more information on the FWAB, refer to the *Military and Overseas Voter's Manual*.



### Marking a Ballot as Undeliverable

If a ballot is returned by the post office as Undeliverable mark the Undeliverable box in the Receive screen.



### Permanent Absent Voter List

The EMP allows for the printing of applications for all voters placed on the Permanent Absent Voter List.

### To generate the AV List:

- Select Permanent AV Search
- 2. Select the Region Type (if necessary)
- 3. Select Election Date
- 4. Select the Precinct (if necessary)
- 5. Click Search

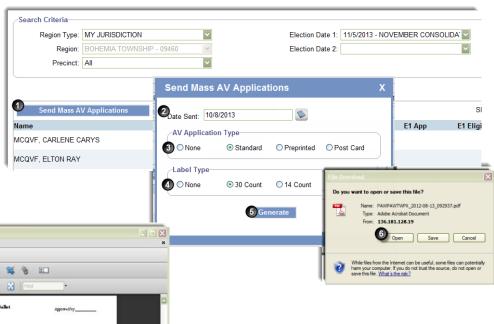


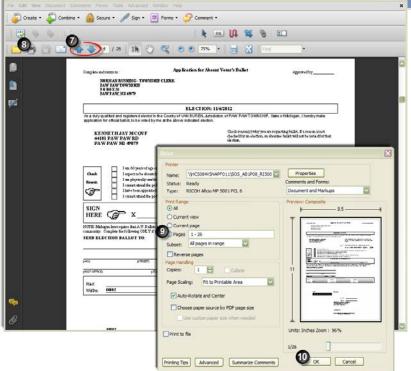
### **Printing the Permanent AV Applications List**

Applications may be printed in a variety of formats. The EMP system allows a user to print the entire form (Standard), use a vendor form (Preprinted), or use a vendor Post Card form.

# To print the AV applications:

- Click Send Mass AV Applications
- Modify the Date Sent (if necessary)
- 3. Select the AV Application Type
- 4. Select the Label Type (if necessary)
- 5. Click Generate
- 6. Click Open





- 7. Review the document (labels will be the last pages of the document)
- 8. Click the Printer button
- 9. Select the Pages to print
- 10. Click OK

Important note: Once the applications are printed, app sent will be attached to the voter's record. All future applications and/or labels will have to be printed from the voter's record.

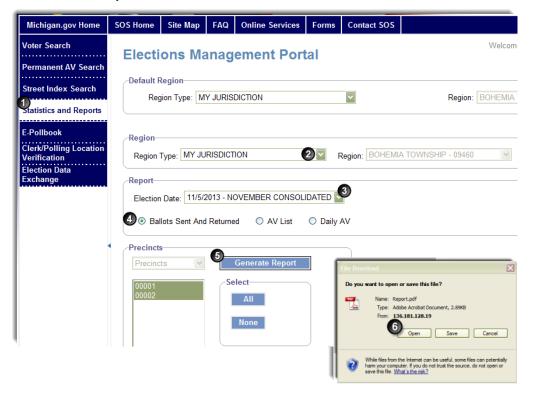
### **Statistics and Reports**

### **Ballots Sent and Received**

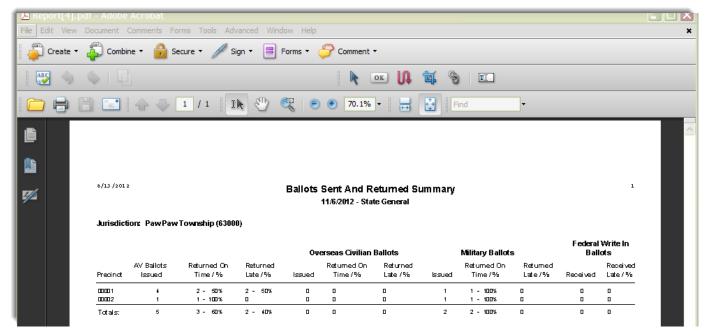
The EMP allows users to create a report for their jurisdiction showing the number of ballots sent and received per precinct.

### To generate the Ballots Sent and Received report:

- Click Statistics and Reports
- 2. Select the Region Type (if necessary)
- 3. Select the Election Date
- 4. Select Ballots Sent and Received
- 5. Click Generate Report
- 6. Click Open

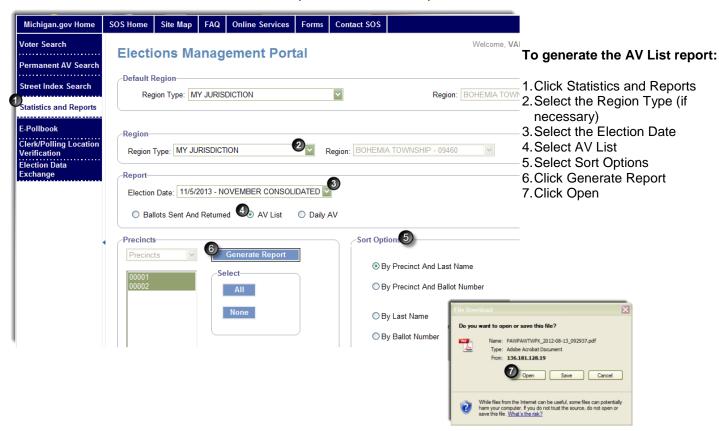


The Ballots Sent and Returned Summary will open in a .pdf file. From this screen you can choose to print or save the file.



### **AV List Report**

The EMP allows users to create a report to be used in the precinct or AVCB as the AV List.



The AV List report will open in a .pdf file. From this screen you can choose to print or save the file.

File Edit View Document Comments Forms Tools Advanced Window Help 🔒 Secure ▼ 🥒 Sign ▼ 📋 Forms ▼ 🔗 Comment ▼ Combine • ок П T)( Ik (0) ● ● 70.1% -圔 8/13/2012 AV List For Paw Paw Township (63000) 11/6/2012 - State General 4 Date App Date Ballot Date Ballot Voter Name / Mailed To Address Ballot # Spoiled # Returned Received Mailled/Issued Rejected 00000001 Mcqvf, Barbara Bise 675 Hazen St B-102, Paw Paw Mi 49079 9/30/2012 9/30/2012 00000002 Moqvf, Caitlin Lindsey 10/1/2012 10/1/2012 10/14/2012 619 Paw Paw St, Paw Paw Mi 49079 00000003 9,30,2012 9/30/2012 Mcgvf, Faith Lynn 205 Miller Ot Apt 204, Paw Paw Mi 49079 Mcqvf, Daniel Graham ET000001 9/22/2012 10/5/2012 40853 County Road 358, Paw Paw Mi 49079 Mcqvrf, George Andrew 9/22/2012 9/22/2012 10/15/2012 608 Hazen St, Paw Paw Mi 49079 Totals: Apps Received Ballots Mailed/Issu Voters 5 Ballots Spoiled Rejected Grand Totals: Apps Received Ballots Ballots Returned

Mailed/Issued

Rejected

Spoiled

Voters

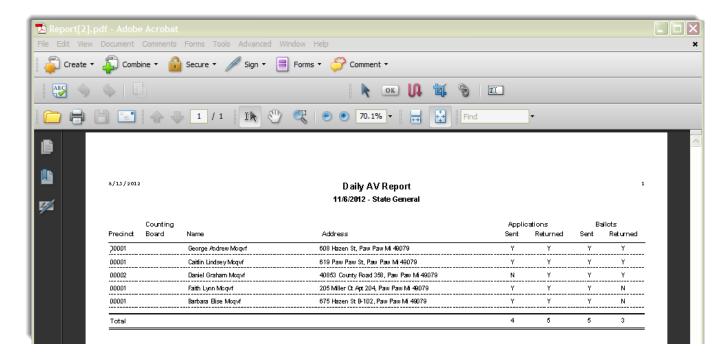
Ballots

### Daily AV Report

The EMP allows users to create a Daily AV report to track daily absent voter activity.



The Daily AV report will open in a .pdf file. From this screen you can choose to print or save the file.



### E-Pollbook

The EMP allows non-QVF users to export the Electronic Pollbook (EPB) software and upload EPB voter history via an internet connection. Refer to the <u>Electronic Pollbook User Manual</u> for complete instructions on how to operate and maintain the EPB software.

### Necessary non-EMP steps to be taken prior to EPB download

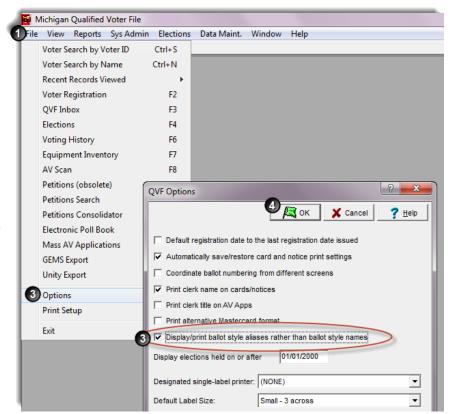
Because AV ballot information is entered into QVF or the EMP, it is recommended that downloading of the EPB software occur after the 4 p.m. AV ballot issuance deadline on the Monday before the election. If this is not possible, a supplemental list of absent voter ballots issued after the EPB download must be supplied to the precinct(s). This will require election inspectors to check that list for each voter. There is not a way to add absent voter information electronically after the EPB download. Practicing the following steps prior to election day is recommended.

#### **Reviewing QVF Options**

Prior to download, ensure Global Geography settings have been previously set in QVF by your County Clerk (see Chapter 3 of the QVF Manual)), especially if using combined precincts or split precincts with more than one ballot style. To ensure the names of ballot styles setup in Global Geography are listed in the EPB software, set **Options** in QVF to show ballot style aliases.

## To set ballot style aliases, login to QVF and:

- 1. Click File
- 2. Click Options
- Select "Print ballot style aliases rather than ballot style names" by clicking the box
- 4. Click OK



### Downloading the EPB Software from EMP

### Logging in to the Privacy Zone and creating a folder

Every time the flash drive is unplugged from a computer, the flash drive will be logged out of the Privacy Zone for security reasons. The Privacy Zone of the encrypted flash drive must be open during this process. **Note:** Please review the complete <u>Electronic Pollbook User Manual</u> for more information on the Privacy Zone.

### To login to the Privacy Zone, insert the encrypted flash drive into a USB port and:

- 1.Double click V-Safe100.exe
- 2. Enter strong password
- 3. Click OK
- 4. Right click anywhere in the window and select New.
- 5. Click Folder
- 6. Name the folder by typing in the box and hitting Enter. Using the date of the election for the folder name will identify the files if there is ever a question in the future.
- 7. Click on the red X to close the window





#### Open EMP and create EPB software

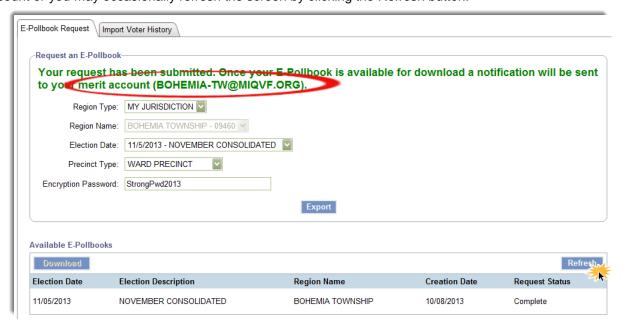
The EMP web application creates the EPB software, essentially taking the voter registration data in QVF and putting it in an easy to use format for election inspectors to use on a laptop.

### To create the EPB software, login to the EMP and:

- 1. Click E-Pollbook
- 2. Select the Region Type & Name (your jurisdiction information is defaulted; the region type
  - should be changed if you are conducting an election for a district that crosses over to another jurisdiction, e.g. school or library district)
- 3. Choose the Election Date
- Select the Precinct Type.
   Combined Precinct should
   be selected if using
   combined precincts. Note:
   combined precincts must be
   setup by the County in the
   QVF Global Geography
   module (see Chapter 3 of
   the QVF Manual), prior to
   this download.
- 5. Enter a Strong Password A strong password contains at least eight upper and lower case characters with at least one number or symbol
- 6. Click Export

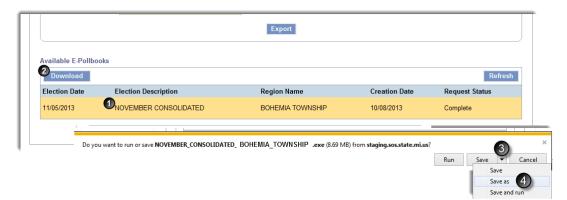


Once Export has been selected, the EMP sends a message to QVF to create your jurisdiction's EPB file. This process could be as quick as a minute or up to an hour depending on how many requests are being processed at the same time. The system will send you confirmation that your download is ready to your merit email account or you may occasionally refresh the screen by clicking the Refresh button.



#### Once the download is available:

- Select the Election Date
- Click Download
- 3. Click the arrow next to Save
- 4. Select Save as



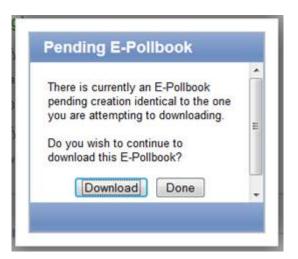
- 5. Make sure the Privacy Zone is selected
- 6. Double click the [ElectionDate] folder
- 7. Click Save

The EPB Software has now been saved and may be taken to the EPB laptop for installation. Refer to the *Electronic Pollbook User Manual* for full instruction.

✓ Save As Computer ▶ PrivacyZone (D:) ▶ New folder Organize -Documents Name Date modified Туре Music 6 ElectionDate 2/4/2013 2:29 PM File folder Pictures Logout Priv Type: File folder ∀ideos Save As C ► Computer ➤ PrivacyZone (D:) ➤ ElectionDate Computer Organize ▼ New folder 🚨 Local Disk (C:) Documents Date modified Type FrivacyZone (D:) 🍶 Music NOVEMBER\_CONSOLIDATED\_MAPLE\_GR... 2/4/2013 2:22 PM → HP\_RECOVERY (E Pictures ☐ HP\_TOOLS (F:)

\_ ■ Videos File name: Save as type: Application 🖳 Computer Local Disk (C:) PrivacyZone (D:) ■ HP\_RECOVERY (E → HP\_TOOLS (F:) File name: NOVEMBER CONSOLIDATED MAPLE GROVE TOWNSHIP Save as type: Application Hide Folders

If you attempt to submit a duplicate request for the same election, the message to the right will be displayed. If you wish to override the first file you requested, simply click Download. If you requested a new download mistakenly, simply click Done.



### Importing the EPB Voter History File

**Within seven days of the certification of the election,** voter history must be uploaded into the EMP or QVF. To enter Voter History via the EMP, login to EMP, insert the encrypted flash drive into a USB port and login to the Privacy Zone.

#### In EMP:

- 1. Click E-Pollbook
- 2. Select the Import Voting History tab
- 3. Click Browse
- 4. Select the Privacy Zone by double clicking
- Double click the ElectionDate folder
- 6. Click Open
- 7. Click Import



When Voter History is complete, the screen will show the Total Records Processed. This number relates to the number of voters that voted in that election and precinct.



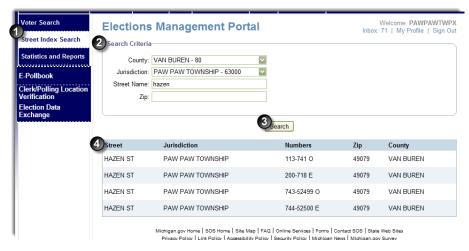
**NOTE:** Voters added to the **Unlisted** tab or voters that were issued a **Provisional-Envelope** ballot will not automatically update. If those voters' ballots were processed, they must be added to QVF and updated using the old Precinct List method (File – Voting History in QVF). Please work with your County Clerk to complete this process as necessary.

### Street Index Search

The EMP may be used to look up QVF street index information. This information could help locate which Clerk to forward a voter registration form that does not fall within your jurisdiction or help a voter locate their local Clerk.

### To perform a Street Index Search:

- Click Street Index Search
- 2. Select the Search Criteria
- Click Search
- 4. View the results

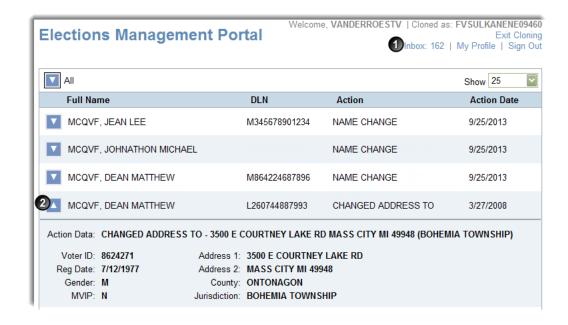


### **Viewing QVF Inbox Transactions**

The EMP allows users to view their QVF Inbox transactions.

### To view QVF Inbox transactions:

- 1. Click Inbox
- 2. Select the triangle next to the voters name to view Inbox Detail for a voter



### **Changing Password**

The QVF Help Desk assigns the EMP username and password. If you do not know your password or your account has become inactive, contact the QVF Help Desk at 1-800-310-5697 for assistance.

### To change the password assigned:

- 1. Click My Profile
- 2. Enter the Old Password and the New Password in both the New Password and the Verify New Password fields
- 3. Click Submit



### **Glossary**

**Dymo Label Printer** – A printer designed to print labels. This printer is not required to use EMP but as in QVF the EMP is programmed to accommodate the printer if a jurisdiction has one connected to the EMP computer.

**FPCA – Federal Post Card Application –** An application available at <a href="www.fvap.gov">www.fvap.gov</a> for Military and Overseas Voters to use to register to vote and/or request an absentee ballot. See the <a href="Military and Overseas Voters Manual">Military and Overseas Voters Manual</a> for full details.

**Permanent Absent Voter List** – A list voters may request to be placed on to automatically receive absentee ballot applications for every election. See the <u>Clerk Accreditation Manual</u> for full details.

**Region Type** – A jurisdiction, county, or a generic (or unspecified) grouping of districts, other than counties or jurisdictions that conduct elections. Examples would be "School Districts," "Villages," "Community Colleges" etc.

Street Index – The listing of streets in QVF that identify a jurisdictions district boundaries.